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THE FUTURE OF THE PORT OF PORTLAND

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Research

PORTLAND PORT FACILITIES

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The Port of Portland, tidewater gateway to the producing areas of Oregon, eastern Washington, Idaho, and adjacent territories beyond, has long offered a system of modern harbor facilities to steamships engaged in both domestic and world commerce. These are located on a deep-water frontage covering approximately twenty-five miles of harbor line in the heart of the city's growing industrial area. All of the public and most of the private docks are equipped with automatic sprinkler systems, fire walls, and hydrants. In addition, the city operates a fleet of three fireboats, each capable of dispensing 10,000 gallons of water per minute.

The general cargo facilities consist of publicly and privately owned terminals. The more important figures regarding these terminals are shown in the following table:

	Number of Terminals	Berths	Shedded Area (sq. ft.)	Open Area (sq. ft.)	Trackage Capacity
Dock Commission	3	18	1,062,730	430,510	1,007
Privately owned	8	15	1,214,200	85,100	468
Total	11	33	2,276,930	515,610	1,475

Both publicly and privately owned general-cargo terminals possess special equipment, which includes a grain

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UPPER COLUMBIA RIVER TRAFFIC

H. T. SHAVER
General Manager, Shaver Transportation Co.

At present the cargo going eastward from Portland by water is practically all petroleum: 100-octane gasoline for the Army and Navy, second-structure gasoline for commercial accounts, and diesel fuel for both the armed services and commercial accounts. Recently the Commodity Credit Corporation has released a certain amount of wheat, and the river lines are enjoying some of this cargo westward. The wheat is all handled in bulk and is delivered to the elevators in Portland harbor.

The points of destination for eastbound traffic are The Dalles and Umatilla in Oregon, and Pasco and Attalia in Washington. Petroleum is transhipped from these points as far east as Boise by the oil companies and the armed services. Wheat destined for Portland originates all through the Inland Empire and is picked up at terminals located at Pasco, Port Kelly, and Umatilla.

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PORT PROBLEMS OF PORTLAND

ALFRED L. LOMAX
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On June 11, 1945, Mayor Earl Riley of Portland called a meeting of approximately 70 shipping operators, traffic managers, exporters, importers, members of the Commission of Public Docks, the Port of Portland corporation, the Army Engineers, and other civic leaders to discuss port problems and their solutions. An executive committee comprising the following persons was appointed:

Hillman Lueddemann, McCormick Steamship Company, chairman; John H. Smith, Hawley Pulp & Paper Company; Henry L. Corbett, chairman, Port of Portland Commision; T. H. Banfield, Iron Fireman Manufacturing Company; Colonel Ralph Tudor, U. S. Engineers; F. C. Pender, manager, Port of Vancouver; John H. Burgard, chairman, Portland Commission of Public Docks; John S. Campbell, Wilcox Hays Company; William L. Williams, American Mail Line; L. R. Hussa, Albina Engine & Machine Works; Thomas J. White, attorney-at-law; E. C. Sammons, U. S. National Bank; A. F. Hartung, Congress of Industrial Organization; Kelly Loe, American Federation of Labor; Capt. Homer T. Shaver, Shaver Transportation Company; E. B. MacNaughton, First National Bank; John C. Albright, Union Pacific Railroad Company; H. K. Cherry, Foreign Economic Administration; Alex Chalmers, States Steamship Company.

During the past five years Portland and all the lower Columbia River cities have been truly "war ports." The Oregon customs district, composed mainly of Portland, Longview, and Astoria, in 1944 was rated fourth place among all United States customs districts in value of ex-

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PORT PROBLEMS OF PORTLAND

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ports ($761,000,000). Approximately two-thirds of lend-lease shipments for the district, largely from Portland, were for the Siberian ports of Vladivostok, Nikolaevsk, and Petropavlovsk.

Portland always has been a large exporter of wheat, flour, lumber, apples, and pears, and at various times in its history was reputedly the foremost wheat and lumber port in the nation. Perhaps it was these past and present contrasting thoughts which stimulated civic leaders to take stock of the port's chances for survival in the probably highly competitive postwar world. The symptoms are not peculiar to Oregon's metropolis; every port on the Pacific Coast has manifested an awareness of its competitive position, leading to a critical but wholesome analysis of community resources and problems.

Portland, perhaps because it is a river port 112 miles from the sea, although actually no farther inland than Seattle, has never been nationally acclaimed as have other ports. In fact, this geographic location at head of tidewater is an advantage to a port in creating closer contact with the hinterland. The early narrow and shallow channels of the Columbia and Willamette rivers, together with the bar, of which rival ports made capital, disappeared many years ago with jetty construction and river maintenance. Today, the largest freighters make Portland a port of call.

But misinformation has continued to spread abroad, and omission of the port in current articles appearing in nationally circulated periodicals, together with apathy at home, has created the impression that Portland is an inconsequential port. The city has as capable business leaders as will be found in any large city. The indifference lies largely at the doorstep of the rank and file of its citizens, who have to date displayed no fierce pride in their port as do San Franciscans and residents of other ports. Wheat, lumber, and fruit ships and tankers may line the city's wharves, but these apparently are only incidental to rose culture and the joy of living amid fir-clad hills which look down upon the harbor.

The beauty of its setting and the color of its gardens have given Portland a wider reputation than the volume of its shipping and trading. The city should be rightfully proud of its homes and boulevards; but these cannot exist unless there is a strong economic structure built around foreign trade, transportation, and power. Some of the "sensitive spots" in this economy are the following problems discussed at the meeting of the abovenamed Port Development Committee:

(1) The merger of the present separate Port of Portland corporation and the Commission of Public Docks.

(2) The elimination of onerous switching charges and zone control by individual railroads, and the establishment of a belt line, either publicly owned or the equivalent, with coordinated railroad administration.

(3)- A study of dock charges, of both public and privately owned facilities.

(4) The need for balancing the port-load factor by increasing imports.

(5) An economic and engineering audit of port facilities to determine their fitness to accommodate new types of ships.

(6) The indifference or lack of risk capital to establish a home-owned steamship line as part of a Pacific Basin market development.

(7) The drawbridge problem as a hindrance to shipping.

(8) Creation of a Portland-Vancouver Port Authority patterned after the bistate New York-New Jersey port area.

(9) Re-examination of the railroad rate structure and its relationship to exports through Columbia River and Puget Sound ports.

These are only a few of the many vital but delicate problems which must be brought out into the open and discussed frankly; a solution must be attempted, otherwise the port's chances for survival in the postwar world are likely to be definitely limited. Some of the problems reflect the complicated and seemingly never-ending conflict between long-established private interests and community welfare. Surely, if the representatives of 46 nations can meet as they did recently at San Francisco to find a partial solution to world problems, the business leaders and citizens of a moderately large city should be able to do the same for their comparatively simple local and regional problems.

PORTLAND PORT FACILITIES

(Continued from page 1)

elevator (2,000,000 bu. capacity), a bulk oil and storage plant, two cold-storage plants, a locomotive crane, a number of marine elevators, etc.

In addition, there are 22 docks operated by industrial concerns in connection with their various businesses. Six of these are lumber wharves and 9 are owned by oil companies.

A wide variety of floating equipment is maintained in the Portland harbor to meet the requirements of shipping interests. Both the Port of Portland Commission and private concerns provide towing service, with an aggregate of approximately 50 towboats. There are approximately 75 tow barges for general lighterage, having capacities ranging from 1,000 to 2,000 tons. In addition, there are several tank barges for the transportation of petroleum products and the bunkering of fuel oil. A number of derrick barges are equipped with cranes capable of lifting from 6 to 25 tons; during the war several heavy-lift water cranes brought in by the Army have been in almost constant operation.

The physical facilities of the port have been further augmented by the vast network of shipbuilding and repair yards which have been constructed and improved during the war. It is hoped that they will continue to play an im-

portant role in the postwar maritime activity of the port. Examples of such improvements are the loading pier equipped with a 100-ton revolving stiff-leg crane belonging to the Willamette Iron & Steel Corporation, and the 14,000-ton steel floating dry dock recently installed at the Kaiser Swan Island yard to supplement the 8,000- and 15,000-ton dry docks owned and operated by the Port of Portland.

The Commission of Public Docks is also preparing a $3,000,000 program of new construction and modernization for the municipal terminals, to be financed by a bond issue recently approved by the voters of Portland.

From these facts it can readily be seen that the port will be adequately prepared to handle an anticipated volume of postwar commerce far in excess of any total attained in past years.

Charges at the major Northwest ports operating under published tariffs are practically uniform. However, a great deal of uncertainty exists in the minds of many people concerning the position occupied by the Northwest group in competition with major ports in California, the contention by interested parties often being that a higher scale prevails in the Northwest. Any attempt at actual comparison is difficult because of the multiple differences in rate structure and methods of assessment.

But a close scrutiny of the matter brings to light some very interesting facts and discloses that, in general, it is the *distribution* of charges between the cargo and the vessel which accounts for the discrepancies rather than the sum total of charges assessed. For example, the terminals in Portland make no berthage or dockage charge against a vessel when it berths to load or discharge cargo, and terminal operators assess a charge against the cargo for handling it from place of rest on the dock to ships' tackle or *vice versa*. At San Francisco and Los Angeles, the steamship lines make a general practice of transporting cargo to and from the place of rest without charge, or of absorbing all charges in excess of a certain amount per 2,000 lbs.; but they pay a dockage charge based upon net or gross tonnage to the respective harbor boards, in addition to paying a rental for the pier and such overhead as electricity, watchmen, checking, etc., for their own account. Under normal conditions, the handling charge assessed at Portland is absorbed by most of the steamship lines operating in regular scheduled services, except on cargo originating or destined locally to or from a foreign country.

Freight moving under import and export rail rates does not have to stand either a car loading-unloading or handling charge, these being absorbed by the rail and steamship lines. Charges for each of these services at Portland average 75 cents per 2,000 lbs. or 40 cu. ft., with a limitation of $1.50 per 2,000 lbs. if the ratio of measurement to weight equals or exceeds 2 to 1. Published tariff rates for car loading and unloading at San Francisco and Los Angeles vary much more according to commodity classification than at Portland, with the average rate lower because the assessment is on a strictly weight basis. However, wartime conditions have increased costs to such a degree that it has been necessary for terminal operators in all major Pacific Coast ports to place much of the car work on a contract or man-hour basis. New scales based upon actual cost of service performed will undoubtedly be given primary consideration in postwar planning by terminal operators. Recent cost studies have shown practically all published tariff rates for this service to be noncompensatory.

All cargo at Portland is subject to a wharfage charge, the average of which is 50 cents per 2,000 lbs. or 40 cu. ft., with a limitation of $1.00 per 2,000 lbs. At the California ports the average rate is 25 cents, weight or measurement, with no limitation imposed. Thus, on cargo carrying a high ratio of measurement to weight, the charge for wharfage at these ports often exceeds what it would be at Portland on the same commodity, even though the per-unit rate is lower. This is the type of difference in rate structure which causes most of the confusion in the mind of the layman who attempts to analyze comparative costs between the two port groups of the Pacific Coast. However, a coordinating committee, composed of members of the Northwest Marine Terminal Association and the California Association of Port Authorities, is constantly working toward more uniformity in charges and practices, and noticeable progress in this direction is probable in the not-too-distant future.

In a recent chart of comparative stevedoring efficiency furnished by the Army to the War Labor Board panel arbitrating a new work contract between the International Longshoremen's and Warehousemen's Union and the Waterfront Employers Association of the Pacific, Portland ranked as follows for the year 1944 in relation to other major Pacific Coast ports for cargo handled per gang hour of eight-men gangs:

Portland	15.1 weight tons—21.2 meas. tons
Seattle	15.3 weight tons—28.4 meas. tons
San Francisco	11.6 weight tons—22.5 meas. tons
Los Angeles	12.5 weight tons—28.5 meas. tons

The range in averages can be attributed to a wide variety of causes, the tonnage for each port being abnormally low because of wartime conditions. But the figures prove beyond any doubt that Portland is fully qualified to meet its competition in stevedoring efficiency. Stevedoring rates compare favorably with other major Pacific Coast ports.

Portland is served by four transcontinental railroads, four lines serving local territory, and two performing only switching and terminal service. Terminal yards owned by these lines can accommodate over 1,000 cars at one time without becoming congested. The multiple service afforded by the various lines gives the port a great advantage in interchange between rail and water facilities.

Ships calling at Portland must necessarily pay higher pilotage fees than are assessed at Puget Sound or California coastal ports because of channel navigation. These fees, however, represent a very minute part of overall steamship operating costs. The safety record established by both Columbia River and Columbia Bar pilots over a period of years has been the primary factor in reducing marine-insurance rates by as much as 50 per cent and has completely nullified any geographic disadvantage which might be said to exist. Portland's location actually works to advantage, when such factors as proximity to

source of cargo, rail-freight rates, fresh-water harbor, etc. are considered. Pilotage rates between Portland and Astoria are $1.50 per foot deep draft plus 1½ cents per net registered tonnage. This same scale applies between Astoria and the bar, but ships whose captains are familiar with the entrance to the Columbia ordinarily do not require bar pilots. San Francisco and Los Angeles bar-pilotage rates are also assessed on a draft and tonnage basis, the charge at San Francisco being $2.00 per draft foot plus 1⅛ cents per net registered tonnage, and at Los Angeles 9/10 cent per gross registered ton, with a minimum of $10.00 and a maximum of $180.00 for each movement. The rate to Puget Sound ports is $1.15 per nautical mile with a minimum of $25.00 per vessel.

The development and maintenance of a channel 500 feet wide and 35 feet deep at low water from the ocean to Portland is a government project that has been actively sponsored by interested municipalities for a great many years. Dredging, construction of dikes, revetments, etc. have been largely responsible for aiding in the growth and development of Portland as a world port, and the city need have no fear of its future position in maritime commerce if a channel of this width and depth is maintained. The average fully loaded cargo ship in present-day traffic draws from 26 to 29 feet or less. Dredging and the construction of jetties at the mouth of the Columbia have resulted in a splendid entrance channel with a depth of 40 feet at low-water level. These developments, combined with the program carried on by terminal operators in maintaining deep-water levels adjacent to pier structures, make Portland a desirable port of call for steamships from all parts of the world.

UPPER COLUMBIA RIVER TRAFFIC

(Continued from page 1)

There are now two large firms engaged in river transportation east of Celilo. These are the Tidewater Shaver Barge Lines (the Shaver Forwarding Company has purchased the Tidewater Transportation Company) and the Inland Navigation Company.

There are 9 tugs, 23 barges, and 1 self-propelled combination petroleum and cargo barge engaged in this traffic. The equipment is all built of steel and is very modern, including some of the highest-powered diesel tugs in the country. The petroleum barges have capacities as high as 300,000 gallons (equivalent to a freight train of approximately 30 tank cars), and the wheat barges can handle approximately 600 tons apiece.

The barges, except for the self-propelled unit, carry either petroleum or wheat. Thought was given in their original construction to obtaining a wider and greater service from them. It would be very easy to carry canned goods, wool, and other bulk commodities that are not perishable on return trips of the oil barges. The construction of deck houses, which many of the barges are designed to carry, would make them much more usable for other cargo. In one instance a house was constructed on such a barge and wheat was carried on deck and on top of a coffer dam. This made a very efficient operating unit; the barge was equipped with worm gears to bring the wheat to a sump in the forward end, where it was removed by a marine leg, either a mechanical conveyor setup or suction. These same changes could be made on other petroleum barges, which would enable a wide range of commodities to be transported by water.

At present wheat is handled only in barges built for that purpose. However, they are readily accessible, for the return up river, for such general cargo as canned goods, heavy hardware, and other slow-moving commodities. Also, the wheat bins could be decked over and used to carry automobiles and farming equipment.

The possibilities of expansion of river traffic are very encouraging, especially after the construction of the Umatilla Dam and the low-head dams on the Snake River. These dams will place the carriers in a position to tap the heavy tonnages originating in central and eastern Washington and western Idaho. The head of navigation for inland water carriers will then be Lewiston, Idaho on the Snake River and Hanford, Washington on the Columbia, thus putting the barge operators in competition with other carriers in the Yakima Valley and the great grain belt of eastern Washington. This program will practically canalize the Columbia River above Umatilla, and will give to Portland and other lower Columbia River ports a decided rate advantage over competitive Pacific Northwest ports. Looking forward to these developments, the water carriers and the communities along the river are studying through rail-barge rates. Such combination rates would be of great benefit to the farmers and shippers of the Inland Empire and would more firmly entrench the competitive position of the lower Columbia River ports.

There are no special problems or difficulties which would limit expansion after the now-authorized dam programs are completed. However, at the present time navigation is restricted by depths of the channel between Celilo and points on the upper river, so that at certain low-water periods full tonnages cannot be carried. Also, freshets may cause such swift currents that only one barge at a time can be handled. These difficulties will be eliminated with the completion of the proposed government program for improvement of the Columbia River, which should add a great deal to the prosperity of the whole Northwest.

The Department of Commerce has just released a booklet, *Establishing and Operating Your Own Business*, which deals broadly with all types of small business, including those in the service field. The war veteran or other citizen who contemplates going into business for himself is cautioned that, before doing so, he should acquire all possible information concerning the particular line in which he is interested. The booklet does not advise anybody to establish a business, or to refrain from doing so. The decision is up to the individual. Where an individual lacks experience in the line he proposes to follow, he is strongly advised to first take a job with a successful concern in that field and absorb all the know-how possible before starting on his own. Copies of the booklet may be obtained at 10 cents each from the Portland office of the Department of Commerce.

OREGON FARM INCOME AND EXPENSES IN 1944

The Bureau of Agricultural Economics has released figures showing the average realized net income of farm operators, per farm, for 1944. The Oregon data, along with the 1943 figures for comparison, are shown below:

	1944	1943	Change
Gross income from agriculture (includes cash receipts and value of farm products consumed on farm)	$5,631	$5,283	+$ 348
Production expenses	2,846	2,673	+ 173
Net income from agriculture	2,785	2,610	+ 175
Government payments	156	90	+ 66
Total realized net income	$2,941	$2,700	+$ 241

Total 1944 farm receipts (cash and nonmoney) for Oregon farm operators were $310,378,000; government payments were $8,600,000; the total gross income was $318,978,000. Deduction of expenses leaves a net income of $162,107,000.

Production expenses for all Oregon farm operators in 1944 were composed of the following elements:

Current operating expenses, excluding labor:	
Feed	$ 31,919,000
Livestock purchased	4,335,000
Fertilizer and lime	1,988,000
Operating motor vehicles	11,713,000
Miscellaneous	28,416,000
Hired labor	49,288,000
Maintenance and depreciation:	
Buildings	8,268,000
Motor vehicles	6,043,000
Machinery and equipment	6,014,000
Taxes	5,003,000
Mortgage interest	3,884,000
Total	$156,871,000

MANUFACTURERS PLAN NEW CONSTRUCTION

Manufacturing firms throughout the nation are planning large outlays for plant, equipment, and alterations over the next 12 months. The total of approximately $4½ billion is nearly three times the 1937 to 1940 average and more than half again as large as in 1929.

These are plans, not commitments. They are being kept flexible to meet a range of possible conditions and contingencies. They do, however, reflect the considered judgment of an adequate cross-section of American industry.

The indicated market for construction, equipment, and machinery will be an important influence favoring the transition from war production to a high output of civilian goods. The planned outlays are greater than the total of public and private expenditures on manufacturing facilities in 1944, although well under the wartime peak. The recent thinking of business management is that these outlays for reconversion, expansion, modernization, and postponed replacements are necessary or desirable in spite of the large outlay on war-production facilities.

In some industries the planned outlays are so large as to raise doubts as to whether the supplying industries can produce the desired equipment within the next year. They suggest that the production of many producers' goods will be limited less by demand than by the time necessary to resume or expand production of those goods.

PACIFIC COAST BANK DEBITS SINCE OCTOBER 1941

Indexes of bank debits for Oregon, Washington, and California since October 1941 are shown below.

Bank debits are often used as indicators of business activity. However, the fact that banks debits also arise out of purely financial transactions may limit their usefulness substantially. The Oregon sample includes a large number of "country" banks whose debit totals are comparatively free from these financial transactions. The California and Washington figures, on the other hand, are made up to a much greater extent from debits reported by "city" banks (this is especially true of California), so that they are less accurate indicators of business conditions.

	Oregon	California	Washington
	1941	1941	1941
October	100.0	100.0	100.0
November	88.5	92.8	92.9
December	100.0	111.0	103.7
	1942	1942	1942
January	88.0	102.1	101.6
February	80.4	94.3	85.7
March	103.1	103.3	108.3
April	99.7	98.5	103.6
May	98.9	96.7	109.5
June	110.9	104.4	117.7
July	114.1	109.5	116.0
August	117.5	110.3	120.2
September	127.7	113.1	136.1
October	132.4	110.2	144.2
November	126.5	112.8	103.9
December	136.0	135.2	150.4
	1943	1943	1943
January	119.8	124.6	129.1
February	110.7	113.8	119.7
March	134.7	134.3	148.7
April	152.7	141.6	149.8
May	136.1	131.1	134.8
June	151.5	138.9	146.0
July	154.8	143.5	149.4
August	153.9	141.9	142.4
September	180.0	150.5	165.4
October	160.2	145.2	147.6
November	157.5	148.0	144.7
December	170.9	157.9	155.3
	1944	1944	1944
January	158.9	121.2	151.1
February	156.0	151.2	143.6
March	158.0	160.3	152.3
April	152.0	146.6	143.0
May	152.0	152.4	151.9
June	173.0	167.5	162.8
July	152.8	155.9	159.1
August	159.4	158.1	160.5
September	161.8	154.4	165.1
October	163.3	157.7	154.9
November	174.4	165.6	158.2
December	186.6	178.7	187.6
	1945	1945	1945
January	170.7	140.6	165.2
February	145.9	155.2	145.3
March	168.0	183.8	164.5
April	154.4	160.4	160.7
May	164.1	177.2	162.5
June	183.7	193.1	191.3
July	130.2	174.7	161.6

PORTLAND FOOD PRICES, JULY 15, 1945

(Courtesy, San Francisco Regional Office, Bureau of Labor Statistics)

Portland food prices increased 1.5 per cent during the month ending July 15, 1945. Index readings for the base period, the date closest to the outbreak of World War II, the date closest to the attack on Pearl Harbor, and July 15, 1945 are given below.

1935-39 Average	August 15, 1939	Dec. 15 1941	July 15, 1945
100	96.1	121.3	152.5

OREGON BUSINESS - - JULY 1945

BANK DEBITS

Bank debits represent the dollar value of checks drawn against individual bank deposits. Approximately 90 per cent of all goods, property, and services is paid for by check. Bank debits are regarded as indicators of the general trend of business. The Bureau of Business Research collects bank debits from 92 banks and branches monthly. On occasion, the totals for the same month in different issues of the *Review* are not directly comparable because of necessary adjustments in basic data.

Marketing Districts	Number of Banks Reporting	Debits July 1945	Debits June 1945	Debits July 1944	July 1945 compared with June 1945	July 1945 compared with July 1944
Oregon		$515,409,824	$726,913,981	$608,287,804	−29.1%	−15.3%
Portland (Portland, Hillsboro, Oregon City, etc.)	25	321,191,044	533,043,492	433,444,928	−39.7	−25.9
Lower Willamette Valley (Salem, McMinnville, etc.)	9	44,753,412	42,574,663	41,495,737	+5.1	+7.9
Upper Willamette Valley (Albany, Corvallis, Eugene, etc.)	12	46,923,620	45,756,989	39,288,635	+2.5	+19.4
North Oregon Coast (Astoria, Tillamook, etc.)	5	15,408,501	14,439,606	12,975,973	+6.7	+18.7
Douglas, Coos Bay	4	10,099,532	11,249,680	8,675,957	−10.2	+16.4
Southern Oregon (Ashland, Medford, Grants Pass)	5	18,730,831	17,708,771	16,836,252	+5.8	+11.3
Upper Columbia River (The Dalles, Hood River, etc.)	6	10,584,268	10,342,442	9,355,485	+2.3	+13.1
Pendleton area	6	12,325,413	10,811,080	11,607,779	+14.0	+6.2
Central Oregon (Bend, Prineville, Redmond)	3	5,403,692	6,138,608	5,155,951	−12.0	+4.8
Klamath Falls, Lakeview area	4	16,597,716	19,231,027	16,619,796	−13.7	−0.1
Baker, La Grande area	6	9,035,342	10,795,131	8,972,485	−16.3	+0.7
Burns, Ontario, Nyssa	3	4,356,453	4,822,492	3,858,826	−9.7	+12.9

BUILDING PERMITS

Building permits give an indication of building operations planned rather than actual construction under way. Care must be taken, in interpreting these data, to allow for the lag which may elapse between the issuance of the permit and the beginning of actual construction. The data have been collected by the Bureau of Business Research.

	New Residential July 1945	New Nonresidential July 1945	Additions, Alterations and Repairs July 1945	Total July 1945	Total June 1945	Total July 1944
Albany	$ 22,000	$ 106,500	$ 5,050	$ 133,550	$ 38,713	$ 1,600
Astoria	600	12,000	6,445	19,045	36,206	3,905
Baker	1,800	.....	2,400	4,200	37,450	150
Bend	1,000	730	350	2,080	500	7,020
Coos Bay	20,500	.....	2,600	23,100	18,050	2,500
Corvallis	4,000	14,100	15,175	33,275	44,000	10,655
Eugene	62,000	8,595	26,634	97,229	79,967	32,148
Grants Pass	3,000	5,240	6,779	15,019	*	18,698
Klamath Falls	121,964	600	19,823	142,387	31,671	12,075
La Grande	500	400	5,255	6,155	5,225	3,670
Medford	14,500	1,595	22,195	38,290	20,120	5,530
Oregon City	.....	30,150	200	30,350	1,000	3,555
Pendleton	.....	15,250	2,670	17,920	10,200	1,250
Portland	410,250	688,750	263,375	1,362,375	996,385	381,320
Salem	77,500	61,910	32,745	172,155	*	31,638
The Dalles	8,000	21,650	3,650	33,300	12,100	1,000
28 other communities	175,185	116,560	65,337	357,082	388,598	189,648
Total	$ 922,799	$1,084,030	$ 480,683	$2,487,512	$1,720,185	$ 706,362

* No report.

RETAIL SALES

The sales of a state-wide sample of 435 independent retail stores, collected by the Bureau of the Census, give an indication of trading activity and retail distribution. These figures are often interpreted as indicating purchasing power.

BY MARKETING DISTRICT

	July 1945 compared with June 1945	July 1945 compared with July 1944
Oregon	−5.8%	+7.3%
Portland	−6.7	+10.9
Lower Willamette Valley	−4.0	+5.0
Upper Willamette Valley	−4.4	+5.5
North Oregon Coast	−4.0	+1.8
Douglas, Coos Bay	−5.5	+3.5
Southern Oregon	+8.8	−2.4
Upper Columbia River	−5.2	+6.9
Pendleton	+2.4	+5.7
Central Oregon	−12.8	+3.0
Klamath Falls, Lakeview	−6.2	+2.8
Baker, La Grande	+2.3	−0.9
Burns, Ontario	−0.4	+5.7

BY TYPE OF OUTLET

	July 1945 compared with June 1945	July 1945 compared with July 1944
Oregon	−5.8%	+7.3%
Department stores	−8.7	+10.4
Food stores	+0.1	+5.1
Eating and drinking establishments	+1.6	+9.6
Drug stores	−1.2	+8.6
Apparel stores	−17.4	+8.7
Motor-vehicle dealers	−7.7	+2.5
Furniture, household, radio	+4.8	+26.7
Lumber, building, hardware	+1.5	−0.4

LUMBER PRODUCTION

The West Coast Lumbermen's Association reports that the July 1945 weekly average of lumber production in western Oregon and western Washington was 94,171,000 board feet, a decrease of 30.5 per cent under the previous month and a decrease of 27.7 per cent under the same month a year ago. The weekly average for June 1945 was 135,585,000 board feet, and for July 1944, 130,322,000 board feet.

COMMERCIAL FAIURES

Dun and Bradstreet report that there was one commercial failure in Oregon in July 1945 with liabilities of $5,000. This compares with one failure in June 1945 with liabilities of $5,000, and no failures in July 1944.

LIFE-INSURANCE SALES

Ordinary life-insurance sales in Oregon for July 1945 were $7,180,000, which is a decrease of 5.0 per cent under the previous month, and an increase of 2.0 per cent over the same month a year ago. Sales in the United States decreased 4.3 per cent under the previous month, and increased 11.0 per cent over July 1944. Life-insurance data are related to the financial conditions of individuals and particularly businessmen, because life-insurance contracts are a form of savings.